

16 JAN 1980

PMCD

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MEMORANDUM FOR THE RECORD

SUBJECT: Review of Position Management Survey of the Office of Data Processing Selected Positions dated April 1979

1. PURPOSE: This memorandum officially records an informal understanding between the Office of Data Processing (ODP) and the Position Management and Compensation Division (PMCD) of the Office of Personnel Policy, Planning, and Management regarding the subject review. It presents the objectives and methodology for the review, including the resolution of disputes between the parties. It also establishes the responsibilities of the parties during the review and a timetable for completion.
2. SCOPE: This review and any attendant reaudit of positions is limited to the positions included in the subject survey, except that positions established after the survey within the Divisions covered by the survey will also be audited. This expansion of the original survey will permit the implementation of the survey and review results to establish the grade levels for all related positions in the Processing Divisions of ODP.
3. BACKGROUND: In May 1978, ODP requested a survey of selected positions within the office. The purpose and scope of the survey were documented in the survey report dated April 1979. During the period of June through September 1978, PMCD conducted a survey of the ODP selected positions. PMCD audited ninety-two positions located in Systems Programming Division (SPD), Engineering Division (ED), Operations Division (OD), Production Division (PD), and the Management Staff (MS). The resulting PMCD survey report, dated April 1979, presented several position management recommendations as well as numerous position classification recommendations. Among the position classification recommendations were those to downgrade a significant number of the positions in SPD, ED, and PD.

A meeting was held on 1 November 1979 between representatives of ODP and PMCD to discuss the problem of implementing the survey findings. ODP stated that several of the survey's position management recommendations had been implemented but that ODP could not find sufficient documentation in the position classification findings to justify PMCD's recommended grade levels. ODP established their intent to appeal the survey findings on this basis. Both parties agreed that there appeared to be a lack of documentation of the determinations that resulted in the survey recommendations. They agreed to resolve the problem through a jointly conducted review of the survey. During this review ODP and PMCD will jointly develop benchmark position descriptions in FES format for relevant ADP occupations. PMCD will then apply these benchmarks to the positions in question. [REDACTED] will represent ODP and Mr. [REDACTED] will represent PMCD during the review.

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OBJECTIVES: The objectives of the review are to:

- a. Establish mutually accepted position standards for application to ODP positions.
- b. Resolve differences in judgment concerning benchmarks and their application at the lowest level possible.
- c. Use normal classification appeal channels and time requirement established in HN [REDACTED] for disputed benchmark and position classification grade level findings.
- STATINTL d. Establish a Staffing Complement (T/O) for ODP that accurately reflects the current working organization.
- e. Complete the review process in stages so that agreements and adjudications can be recorded in a timely fashion.
- f. Establish a timetable for expeditious but thorough completion of the review.

5. **METHODOLOGY:** The general steps in the review process are outlined below and covered in more detail in subsequent paragraphs. The steps are

- a. Develop benchmarks for an ADP occupational series.
- b. Apply the benchmarks to contested positions in ODP Divisions subject to this review.
- c. Record the results in stages in ODP's T/O.
- d. Appeal to the Director of Personnel Policy, Planning, and Management (D/OPPPM) (or the DDA and the DDCI if necessary) when unresolvable differences between PMCD and ODP occur.

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6. **BENCHMARK DEVELOPMENT:** PMCD [REDACTED] and ODP [REDACTED] will jointly develop benchmark position descriptions in FES format for selected non-supervisory ADP positions by occupation and grade level. These benchmarks will conform as closely as practicable to existing OPM standards and will be developed with the intent of applying them to similar positions in other components throughout the Agency. The benchmark development process will consist of the following steps:

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- a. ODP providing PMCD with the briefings and tours necessary to understand Processing's mission and functions in sufficient detail to classify positions in Processing.
- b. Agreement on which positions will best represent the ADP occupational series that exist in the Processing components of ODP and other components of the Agency. (Joint activity)

c. Writing benchmark descriptions in FES format that can be applied in all components of the Agency. (Joint activity)

d. PMCD determination of the levels for each factor in the benchmarks and the resulting GS grade level.

e. ODP review of the benchmark factor levels and grade.

f. Resolution by ODP and PMCD of any disagreement over grade levels that may occur.

g. ODP appeal to D/OPPPM for adjudication of differences that remain.

h. ODP appeal through Deputy Director for Administration (DDA) to D/OPPPM for resolution of the issues that remain.

i. DDA appeal to the DDCI for final decision (if necessary).

j. Agreement from other Agency components on the benchmark definitions for application at a later date. (PMCD independent activity)

7. BENCHMARK APPLICATION: As each occupational series of benchmarks is developed they will be applied to ODP positions as follows:

a. PMCD will apply the benchmarks to contested positions in the Divisions employing a particular occupational series, e.g., Systems Programmer.

b. PMCD will, when necessary, reaudit positions that were reviewed in the original survey to gather information necessary for grade determinations. Either PMCD or ODP may request that a particular position be reaudited.

c. PMCD will audit new positions established in Processing since the original survey when they are covered by a benchmark.

d. ODP will provide PMCD with a current position description (PD) for each position involved in the review.

e. ODP will provide PMCD with access to the incumbents of audited positions for purposes of personal interviews.

f. Classification determinations of encumbered positions will be based on current duties and responsibilities and not on projected duties, subject to the following understanding:

(1) A position encumbered by a qualified person for less than one year may be classified "pending grade review" based on the current PD. This tentative classification will be reviewed by PMCD when ODP states that the incumbent is performing the full range of duties in the PD, but in no case more than one year after the conclusion of this joint review exercise.

(2) A position identified by ODP as temporarily occupied by an incumbent who is not fully qualified to perform the full range of duties contained in the current PD will be classified "pending grade review" based on the current PD. This tentative classification will be reviewed by PMCD when ODP states that a qualified candidate is occupying the position and performing the full range of duties in the PD.

g. Unencumbered positions for which ODP is seeking a qualified candidate will be classified "pending grade review" based on the current PD. This tentative classification will be reviewed by PMCD when ODP states that a qualified candidate is occupying the position and performing the full range of duties in the PD.

h. Classification determinations by PMCD will be performed according to the Procedures for Determining Grades by FES Standards prescribed in the Factor Evaluation System handbook published April 1978 by PMCD, with particular attention being paid to Recording the Results.

8. RECORDING THE RESULTS: When mutually accepted or properly adjudicated classification determinations have been made for all the positions included in a particular occupational series, PMCD will record the results in ODP's Staffing Complement, i.e., put it on the T/O books. This step will be subject to the following understandings:

a. Positions marked "pending grade review" in the Staffing Complement of other ODP components which are not subject to this review will not be considered unless there is a direct relationship to positions involved in this review.

b. Positions footnoted on the Staffing Complement as disputed grades (DISP GDE) will continue to be carried as such until the dispute is resolved by this review.

9. RESOLUTION OF DIFFERENCES: As differences arise regarding factor levels or position grades during benchmark development and application, ODP and PMCD will attempt to resolve them at the working level, i.e.,

██████████ If this approach is unsuccessful, C/PMCD and D/ODP will attempt to resolve the difference. If this approach is unsuccessful, ODP may appeal to D/OPPPM for a resolution. Those differences that remain unresolved to D/ODP's satisfaction may be appealed to the DDA and DDCI for resolution as provided in HN █████. The resolution process will be subject to the following understandings and time limits:

a. Once PMCD has made grade level determinations on the benchmarks or ODP positions in an occupational series, ODP will have five working days to review the determinations and agree with them. If ODP disagrees, ODP must notify PMCD within the five-day period; otherwise, PMCD will assume agreement and implement the determinations.

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b. In cases where ODP chooses to disagree with PMCD's determinations, ODP will have 30 days to present new, relevant information regarding the benchmarks or positions in question and appeal the determinations to C/PMCD.

c. If agreement cannot be reached by presentation of this new information and reevaluation by PMCD, D/ODP will present all the issues for a particular occupational series for resolution by D/OPPPM within 30 calendar days of C/PMCD's final determination for the occupational series.

d. When ODP has exhausted its direct appeal to D/OPPPM for a particular occupational series, PMCD will record the results in ODP's Staffing Complement.

e. Where D/ODP disagrees with the decision of D/OPPPM, D/ODP may refer the matter to the DDA who, after review of the determinations, may meet with the D/OPPPM with the intent of reconciling the issues involved. If the D/OPPPM sustains the original classification decisions, the DDA may submit an appeal, through D/OPPPM, to the DDCI whose decisions will be final.

10. POSITIONS EXCLUDED FROM REVIEW: Miscellaneous disputed position issues not covered by the benchmarks being developed during this review will be resolved prior to the development of benchmarks. Except as noted below, all positions included in the April 1979 survey report will be subject to this review. The mutually agreed disposition of these positions is as follows:

| POSITION | DISPOSITION |
|---|--|
| Operations Division General Center New Computer Technician (2) | Delete - Ceiling used elsewhere. |
| Special Center New Computer Technician New Computer Operator | Delete - Ceiling used elsewhere. Delete - Ceiling used elsewhere. |
| Systems Programming Div., Office of Chief GC-56 Peripheral Equip. Op. | Changed to HD14 Clerk-Typing GS-5 |
| Production Div., Data Conv. Br. New Computer Programmer | Established as BG50 Computer Programmer GS-7 |

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11. ANTICIPATED SCHEDULE: ODP and PMCD agree to adhere to the following schedule as closely as possible during the review.

| ACTIVITY | COMPLETION DATE |
|---|-----------------|
| a. Sign memorandum of understanding | 15 Jan 1980 |
| b. Establish occupational series to be covered by benchmarks (includes briefings by ODP for PMCD) | 1 Feb 1980 |
| c. Develop first set of benchmarks (Systems Programming, Telecommunications Specialist) (Impasse to D/OPPPM, DDA, or DDCI as required) | 15 Mar 1980 |
| d. Apply benchmarks in SPD & ED | 1 May 1980 |
| e. Resolve disputes on determinations (Impasse to D/OPPPM, DDA, or DDCI as required) | 1 Jul 1980 |
| f. Develop second set of benchmarks (probably Computer Specialist, Computer Equipment Specialist, and Computer Technician) (Impasse to D/OPPPM, DDA, or DDCI as required) | 1 Sep 1980 |
| g. Apply benchmarks in ED, PD, and MS | 15 Nov 1980 |
| h. Resolve disputes (Impasse to D/OPPPM, DDA, or DDCI as required) | 15 Jan 1981 |

12. AMENDMENTS: This memorandum of understanding may be amended as needed by mutual agreement during the review.

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Director of Data Processing

Chief, Position Management and Compensation

1/16/80

Date

21 Jan 80

Date